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The rise of populism and the new cleavage

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ABSTRACT
While populism tends to be a short-term phenomenon that is typically, but not exclusively, linked to contingent economic and social crises, it may also be triggered by long-term processes of societal change, which take shape in a new structural cleavage that is first expressed by new challenger parties. Initially, such parties may not only express grievances linked to the new cleavage but may also appeal to populist tropes. This review of the literature of populism argues that the populism of contemporary radical right challengers is of this second type. It is best conceived as a secondary phenomenon, essentially fuelled by a new structural cleavage that opposes them to the Greens and to the left more generally. As such, contemporary populism is likely to be temporary, fading away as the new challengers become an integral part of the re-aligned party systems.

KEYWORDS Populism; new cleavage; structural roots; politicisation

Populism has become a growth industry in academia, as documented by the exponential increase in scholarly articles dealing with the subject (Hunger and Paxton 2022). The vast literature on populism has already been summarised in several review articles (Berman 2021; Guriev and Papaioannou 2022; Hunger and Paxton, 2022; Margalit 2019; Mansfield *et al.* 2021; Rodrik 2021; Scheiring *et al.* 2024; Walter 2021). Moreover, the populist *Zeitgeist* (Mudde 2004) is omnipresent, and the concept of populism has not only become popular in academia but is also generously used by journalists, public intellectuals, and observers of everyday politics. Even politicians are increasingly resorting to the term, mainly to characterise their adversaries and to pronounce some dark warnings about the dangers involved in what they see as an increasingly widespread phenomenon.

In order to put the academic avalanche into perspective, I would like to start with the main conclusion of Hunger and Paxton's (2022) review: based on a quantitative analysis of some 900 abstracts of political science

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papers from 2004 to 2018 and a qualitative analysis of some 50 papers, they show that the authors often conflate populism, understood in ideational terms as a 'thin' ideology, and 'thick' host ideologies. In ideational terms, populism can be defined as a set of beliefs that conceive of society as split into two internally homogenous and antagonistic camps – the virtuous people and the corrupt elite – and argues that politics should be an unrestricted expression of the sovereignty of the people (Mudde 2004). Although many studies use populism as the field of study, it turns out that the actual focus of the research is on the host ideology (e.g., nativism, nationalism, or class ideologies). Often, the literature studies the rise of challenger parties from the radical left and, especially, the radical right – parties that practice a populist discourse. However, typically, these parties mobilise latent structural potentials of voters by combining appeals to nationalist or class ideologies with populist, anti-establishment appeals.

In this review of the literature on populism, I am adopting the structuralist perspective of cleavage formation and cleavage politics, which means emphasising the host ideologies rather than the populist complement. This does not mean that I propose to neglect the 'thin' ideology of populism. However, I claim that to understand the rise of contemporary populism properly, we need to relate it to its host ideologies, which are intimately linked to contemporary cleavage formation. Seen from such a perspective, the populists of the rather old radical left mobilise the voters in the name of the people as an oppressed class, rejecting the socio-economic structure of contemporary capitalism and pursuing an alternative economic and power structure involving a major redistribution of resources (March 2012: 8). The populists of the new radical right mobilise the people in the name of the nation. They endorse a xenophobic form of nationalism that can be called 'nativist' (Mudde 2007), claiming that states should be inhabited exclusively by members of the native group (the 'nation'). In contrast, the New Left (the Greens) sticks to the host ideology and hardly uses populist appeals at all.

The structuralist perspective I am adopting to make sense of the contemporaneous rise of populism builds on the Rokkanian tradition that links the structure of party competition in Europe to long-term social-structural trends in society (Lipset and Rokkan 1967). According to this perspective, party competition is structured by deep-seated conflicts – cleavages, which have a structural, a subjective, and a political element, i.e., a distinct social-structural basis, specific ideologies and identities (a political consciousness), and a political organisation mobilising the structural potentials (Bartolini and Mair 1990). The distinction between these three elements of a cleavage provides the conceptual framework for the review. I first present the structural basis in two steps, based on two different approaches – one adopted mainly by economists (including

political economists), the other preferred by comparative political scientists (including political sociologists). Then, I move on to the second element of cleavage – ideologies and identities – and discuss the relative importance of economic and cultural attitudes for the political expression of the structural potentials of the new cleavage before turning to the third element, their political mobilisation.

The three-fold distinction between structural base, ideologies and identities, and their political expression is related to the distinction between demand-side (bottom-up structural) and supply-side (top-down political) factors – a distinction that structures Berman's (2021) review of the literature on populism. The demand-side camp stresses the structural roots of populism, which lie in the economic, cultural, and social transformations of contemporary societies and the associated economic and social-cultural grievances of the citizens. In contrast, the supply-side camp emphasises the growing unwillingness or inability of mainstream political elites and institutions to supply responses to some specific demands of the citizens and the opportunity this creates for populist challengers. The cleavage perspective links the two sides by connecting the latent structural potential to its mobilisation by populist challengers.

In addition, the three-fold conceptualisation of cleavages is also intimately related to the distinction between short-term and long-term change: the structural roots refer to long-term developments (which may be punctuated by critical junctures of economic and political crises), while the political articulation does not only respond to long-term trends but also to short-term, contingent factors such as crisis-specific policies (e.g., austerity policies), incumbencies, or party strategies. I argue that populism tends to be a short-term phenomenon that is typically, but not exclusively, linked to cyclical or contingent economic and social crises. Sometimes, as in the case of the contemporary populist challenge in Europe and the US, populism may also be triggered by long-term processes of societal change, which take shape in a new social-structural conflict that is first expressed by new challenger parties. Initially, such parties may not only express the grievances linked to the new cleavage but may also appeal to populist tropes. My suggestion is that the populism of the contemporary new challengers from the radical right is of this exceptional type: it is best conceived as a secondary phenomenon that is linked to the rise of these new challengers who seize the opportunity to be the first to articulate the grievances of one of the opposing camps of the new cleavage. As such, contemporary populism is likely to be temporary. It is likely to fade away as the new challenger parties become an integral part of the re-aligned party systems. With the expected mainstreaming of the new challenger parties, they are likely to abandon their populist appeals, focus more on their host ideologies, and become part of the new consolidated mainstream.

The social structural roots of the new cleavage

Two main strands in the literature approach the current political turmoil created by the success of populist challengers from the perspective of long-term structural developments: a literature that focuses on socioeconomic transformations leading to economic hardship and the decline of the working class and a literature that focuses on socioeconomic transformations leading to the rise of the knowledge society and the new middle class, which provokes the reaction of the declining working class. I shall consider them one after the other.

Economic stagnation and the decline of the working class

As is observed by Berman (2021), unsurprisingly, economic explanations of populism have figured prominently in research by economists and political economists. The simplest economic explanation of populism is based on economic growth. *Growth* is important because it provides reduced levels of poverty, superior health, improved education, improved work-life balance, more leisure, a decline in housework (the washing machine was allegedly the most important invention of the Industrial Revolution), increased happiness, and pays for a generous state (Susskind 2024). For Gordon (2016), more growth is better, period. Friedman (2005: 14) adds that growth is valuable not only for our material improvement but also for how it affects our social attitudes and our political institutions – in his words, our society's 'moral character'.

According to Friedman (2005), growth leads to openness, tolerance, mobility, fairness, and democracy, while stagnation leads to a movement away from these values. He shows across the history of the United States that, with the important exception of the Great Depression, periods of stagnation gave rise to illiberal, populist reactions, while periods of growth initiated progressive politics. For example, late-19th-century American populism was, in large part, an expression of the anxieties and frustrations created by the hard economic times that persisted for nearly a generation leading up to the mid-1890s. Friedman focuses on the US but documents the same phenomenon in Britain, France, and Germany. In line with this sweeping economic interpretation of populism, Funke, Schularick, and Trebesch (2016) show that politics takes a hard right turn after financial crises. This pattern is visible in the data before and after World War II. It is telling that the world economy has entered a slump in growth since about 2000 (Susskind 2024: 154): in Germany and Japan since around the mid-1990s, in France, the UK, and the US shortly after. From this perspective, the current populist *Zeitgeist* has its roots in economic stagnation.

Growth is important, but growth alone does not suffice as an explanation.[1] The exception of the Great Depression indicates that it is hard to generalise across time and space. In Germany, where unemployment rose to 34% during the Great Depression, and industrial production fell by 42%, more than in any country except the US (Friedman 2005: 273), the extraordinary calamity, indeed, triggered the rise of the Nazis, as one would have expected. However, the effect of the Great Depression in the US poses great difficulty for Friedman's sweeping argument since it did not give rise to right-wing populism but to Roosevelt's social reforms. To explain this exception with Roosevelt's personality and the extraordinarily widespread impact of the economic disaster, as Friedman (2005: 178) attempts to do, is rather unconvincing.

Is the current rise of populism compatible with this sweeping economic explanation? For Sandbu (2020), economics is the ultimate cause of today's divided politics. Similarly, for Moawad and Oesch (2025: 26), much of the recent turmoil in Western democracies has to do with economics, or, more specifically, with *working-class decline*. The lower half of the population in advanced economies saw the fruits of globalisation pass by. Sandbu invokes three main trends that stand behind this stagnation: sharp decreases in economic growth, decoupling of wage increases from productivity increases, and increasing inequality. Moawad and Oesch (2025) show that the 1980s were the watershed moment when wage and productivity growth became uncoupled: as a disproportionate share of income went to those at the top of the wage scale, ordinary workers were left empty-handed, and redistribution by the welfare states did not keep up. The often-heard claim that the middle class has been the one left behind (e.g., Markovits 2019) is true only when compared to the fortune of those at the top. This claim ignores the fact that the real losers in most (but not in all) countries in recent decades are those at the bottom – the working class. The working class's weaker bargaining power and the decline of industrial conflict contributed to the trend. Since the 1980s, the working class has systematically fared worse than the middle class. As markets and politics failed to deliver improvements in living standards, growing sections of the working class turned towards candidates and parties of the populist radical right (see Bornschier and Kriesi 2013; Kurer 2020; Oesch and Rennwald 2018; Hall 2023).

Another branch of economic literature explicitly focuses on the effect of *short-term economic shocks*, such as the China shock, labour market insecurity, austerity, foreign currency debt shocks, bank failures, and housing demand shocks, on the rise of populism. Thus, Rodrik (2021) reviews the effect of trade shocks on the changing appeal of populism. Scheiring *et al.* (2024) also take stock of this kind of effect. They select 36 studies (out of 788 studies they originally identified) that fulfil their

rigorous inclusion criteria (quasi-experimental studies following a causal inference design) for closer inspection. Based on this (limited) set, they conclude that economic insecurity caused by economic shocks explains about one-third of the recent rise of populism, where populism in most studies refers to the radical right. However, as is observed by Margalit (2019), such studies on change tend to overstate the impact of economic insecurity because they tend to privilege outcome significance over explanatory significance: a small change in the electorate's vote choice may change the electoral outcome (i.e., may provoke a change in government or parliamentary majority/minority) in the short run if the electoral competition is close (as was the case in the 2016 or 2020 US elections), but explains little of the overall level of the populist vote. Most such studies use Diff-in-Diff (DiD) designs where the chief explanatory variable is the contemporaneous change in exposure to the economic shock at the regional unit (or rather an instrument of that exposure) (e.g., Autor *et al.* 2020; Algan *et al.* 2017; Colantone & Stanig 2018). Such a design removes from the analysis all the important stable differences across units in levels of populist support, which are obviously related to more long-term differences related to the decline of the working class.

This literature is complemented by arguments that put into evidence *the subjective side of the working-class decline* – its grievances, relative deprivation, status loss, and unfulfilled expectations. With the advent of the service economy, the concomitant rise in female employment, and more equitable gender roles, the typical male blue-collar worker has most dramatically lost in terms of status. Accordingly, the strongest support for populist parties comes from those a few rungs up the socioeconomic ladder who are afraid of falling further down (Bornschier and Kriesi 2013; Gidron & Hall 2017; Häusermann 2020). Fear of individual and collective status loss has been claimed to be decisive for the radical right vote ever since Lipset's (1959) classic account (see Rydgren 2007: 248). Status loss is a form of relative deprivation that leads to resentment, i.e., the intense feeling that status relations are unjust, combined with the belief that something can be done about it (Petersen 2002: 51). Status anxiety has been proposed as the major mechanism for the electoral success of the NSDAP in the 1930s. Falter *et al.* (1983) and Falter (1984) analysed aggregate data on the German election results of 1932 and 1933 at the district level (Kreise). Their findings support the hypothesis that employed and salaried employees were affected by the general climate of fear and hopelessness and cast the deciding votes for the Nazi party. At the same time, unemployment did not directly contribute to the Nazi vote. Unemployment rates turned out to be negatively related to the electoral success of the NSDAP. Instead, there was a positive relationship between unemployment rates and KPD vote share.

The status loss hypothesis has been confirmed in more recent studies of contemporary trends. On the one hand, ethnographic studies in various Western countries have substantiated the importance of relative deprivation among the lower classes (Hochschild 2016; Cramer 2016; Gest 2016; Eribon 2010; Nachtwey 2018). On the other hand, increasingly sophisticated quantitative studies provide detailed and convincing evidence for this phenomenon (Kurer 2020; Abou-Chadi and Kurer 2021; Kurer and Van Staalduinen 2022; Häusermann *et al.* 2023; Burgoon *et al.* 2019; Condon and Wichowsky 2020). Let me illustrate the latter studies with the example of Kurer's (2020) analysis of the reaction of routine workers (25–30% of the workforce) to increasingly bleak labour-market prospects in the face of rapid technological progress. Based on panel data from Switzerland, Germany, and the UK, Kurer can disentangle *fear* of economic decline as opposed to *experiencing* it by comparing survivors who cling to their routine jobs and dropouts who have lost their jobs and experience unemployment. In line with the earlier aggregate-level results from the Weimar Republic, he finds that it is not unemployment or acute material hardship that drives voting for the radical right but the perception of relative social decline and concern about one's position in the social hierarchy.

Knowledge-based society, globalisation, and the rise of the new middle class

The decline of the working class is, however, only part of the story. For cleavage to exist, we need two camps that are opposing each other. In the case of the new cleavage in question, the rise of the new middle class, the opposing camp, preceded the decline of the working class. It has its origin in the post-war boom (*'les 30 glorieuses'* – 1945–75). Subsequently, its initial rise during this period was enhanced by the deepening transition from the industrial to the post-industrial, knowledge-based society and the accompanying intensified globalisation. The transition to the knowledge-based society was characterised by the expansion of tertiary education, the feminisation of the workforce, the decline of manufacturing, the rise of the service sector, intensified technological change (ICT-revolution), and large, successfully growing cities attracting skill clusters, young professionals, and innovative companies. Authors like Hall (2022, 2024), and Iversen and Soskice (2019) place the rise of populism in the context of this transition and its socio-economic consequences. They argue that, faced with the development of the knowledge economy, large left-behind minorities feel alienated from society and democratic institutions and constitute the mobilisation potential for populists.

Arguably, globalisation added to the fuel of the knowledge-based transformations (Kriesi *et al.* 2006; Kriesi *et al.* 2008; Kriesi *et al.* 2012).

Globalisation or 'denationalization' (Zürn 1998), understood as the opening-up of economic, cultural, and political national borders, which started to accelerate in the late 1980s, led to increasing international economic competition and outsourcing of low-skilled work (e.g., the already mentioned 'China shock'), an increasing influx of migrants from ever more distant and culturally more different shores, and increasing political integration in the European Union. The consequences of the multiple border openings enhanced the structural conflicts between the middle-class 'winners' and the working-class 'losers' of the rise of the knowledge society. However, the 'losers' from globalisation cannot be reduced to the working class. They are a heterogeneous group of people whose life chances were traditionally protected by national boundaries. They are a diverse group because they may be threatened in economic terms (because of increasing international economic (trade) competition, delocalisation (outsourcing), and foreign worker immigration), cultural terms (because they are not prepared to cope with a multicultural society), or political terms (because of supranational integration that constrains the national policymakers).

Whether they emphasise endogenous transformations or globalisation as the driving force of change, a variety of authors perceive the new middle classes and the highly educated as the winners of societal transformation. The expansion of tertiary education and the transition to an economy dominated by the service sector led to the expansion of the new middle class. Moreover, as new technology, the multicultural society, and the new international division of labour favour skills,[2] *education*, the most important asset of the new middle class, has become the key source for a good job and economic prosperity in the rich nations of the world (Markovits 2019: 249). Lack of education, in contrast, has become a major factor in getting a poor job and losing status, social recognition, and esteem. Lack of tertiary education is characteristic of the working class, and, in the US, the increasing wage gap between the highly educated and those without tertiary education has reinforced the decline of the working class from the 1980s through to the present day. Note, however, that in European welfare states, the size of the college wage premium is considerably less pronounced and has been decreasing over time (from 1995 to 2013) (Weisstanner and Armingeon 2020).

In addition, education provides the means (e.g., language skills) to deal with multicultural diversity. In other words, winners and losers are not just winners and losers in economic terms. Several studies have delved into the role of higher education in fostering new group divisions, both in terms of values and group identity (Ivarsflaten and Stubager 2012; Stubager 2009, 2013; van der Waal *et al.* 2007). The highly educated middle classes are not only advantaged economically, but they are also

becoming increasingly associated with universalist values and cosmopolitan, urban, culturally diverse lifestyles and consumption patterns. In contrast, for the losers from the working class, status loss is not just an economic but also a cultural loss for which they seek to compensate by cultural means. 'Pride in national or rural communities, identification with hard work, or adherence to traditional, conservative, more patriarchal moral standards of success provide a path to positive identity even for objective losers of economic and social change' (Bornschier *et al.* 2024: 18; Shayo 2009; Duina 2018).

The expansion of tertiary education has led to an expansion of the new middle class, and it has also allowed for upward social mobility out of the working class into the middle class. Van de Werfhorst (2024) shows that educational expansion equalised opportunities across many countries. In other words, the meritocratic creed, according to which merit, deservingness, and opportunity allow everyone to rise in the social status scale, is, to some extent, empirically vindicated. For those who did not make it into the new middle class, however, the consequences are even more galling because they only have themselves to blame for their lack of success. Adding insult to injury, the hubris and condescension of the winners make the losers feel humiliated and develop resentment against those whom they perceive as looking down on them. This kind of resentment is, Sandel (2020: 25) argues, at the heart of the populist uprising against the elites. More than a protest about immigrants and outsourcing, the populist complaint, Sandel claims, is about the 'tyranny of merit'.

Let us add that education is not the only relevant factor for the formation of the new structural cleavage. If education provides access to the new middle class, *occupation* and *educational field* differentiate the new middle class into separate sub-classes. The immediate task experience matters beyond the educational level, with important political implications. Thus, in political terms, there is a well-known divide within the new middle class, part of which (the social-cultural professionals) leans to the left, while another part (the administrative and technical professionals) leans to the mainstream right (Kriesi 1998; Kitschelt and Rehm 2014; Oesch 2006). Related to these older findings, based on data from the United States and Europe, Hooghe *et al.* (2024) observe that the human-centeredness of a person's field of education is strongly and positively associated with liberal attitudes on race, redistribution, the environment, trust in elections, and with their party identification. When they compare those who finished their education in high school with those with college degrees, they find that the human-centered skill content of a person's education explains more variation in liberal/conservative attitudes than whether the person went to college or not.

A cultural cleavage

The new structural cleavage between the working class and the educated new middle class has been politically articulated mainly around cultural issues. On the political supply side, this is manifested in the increasing salience of non-economic issues in the party manifestos (Inglehart and Norris 2017: 448; Hall 2022: 12). On the political demand side, it is reflected in the increasing importance of cultural issues related to the new cultural dimension of the political space for determining the vote in Western European countries since the 2000s (Dassonneville *et al.* 2024). The new cleavage is, therefore, not a class cleavage in the traditional sense but a cultural cleavage that cuts across the traditional class cleavage between workers and employers or owners of the means of production. To appreciate this, we need to consider the sequence of the emergence of the two opposing classes, i.e., the fact that the rise of the new middle class preceded the working class decline and set the terms of the conflict.

If economic stagnation has led to a working-class decline, relative deprivation, political resentment, intolerance, and withdrawal, economic growth and economic advancement have led to the opposite, i.e., the rise of a new middle class was accompanied by openness, tolerance, mobility, and fairness. Thus, the end of the long post-war boom coincided with a cultural revolution that was mainly driven by the rising new middle class. Inglehart (1977) called it 'the silent revolution' that led to what he then called post-materialism at the cost of materialist thinking. Inglehart relied on Maslow's psychological theory, which argues that humans pursue the fulfilment of a hierarchy of needs: first come the basic needs of survival, which, once fulfilled, make room for the pursuit of more lofty (post-materialist) goals such as social tolerance of diverse lifestyles, religions, and cultures, multiculturalism, international cooperation, democratic governance, and protection of fundamental freedoms and human rights. This silent revolution had its greatest impact on the new middle class, above all, as already observed, on one of its parts – the sociocultural professionals (professionals in human services). The new values of this revolution were first articulated in the late 1960s and early 1970s by the so-called new social movements – such as the student movement, the women's, ecological, peace, human rights, or the squatters' movement – and later by the parties of the New Left, i.e., the Greens, which emerged from these movements.

The success of this mobilisation, in turn, sequentially induced two types of cultural backlash among the culturally conservative parts of society, which most notably include the traditional working class. First, the rising post-materialism of the end of the post-war growth period initiated a cultural backlash against the shifting values among people who felt

threatened by this development (Ignazi 2003; Bornschier 2010; Norris and Inglehart 2019). Later on, the cultural backlash turned, above all, against immigration and the multicultural society. Accordingly, Mudde and Rovira Kaltwasser (2018: 10) define the 'cultural backlash' more narrowly as a reaction to immigration and multiculturalism. In political terms, the cumulative effect of this twin cultural backlash was the reinforcement of the populist radical right, with the effect of the second backlash gradually eclipsing the effect of the earlier one. As a result, support for populist radical right parties is mostly an expression of nativism, an ideology claiming that states should be inhabited exclusively by members of the native group (the 'nation'). Ivarsflaten (2008: 15) finds that 'migration policy preferences are close to a perfect predictor of not voting for the populist right' (see also Arzheimer 2009; Dancygier 2010; and the review by Amengay and Stockemer 2019). In the United States, scholars consistently find that 'racial animus', or attitudes regarding 'blacks, immigrants, and Muslims', are the best predictors of support for President Trump (Sides *et al.* 2017). Additional evidence comes from survey experiments, which help to control for desirability bias, e.g., Sniderman *et al*.'s 'list experiments'. Such experimental studies indicate that anxiety over changing demographics and a declining predominance of white people underlies part of the natives' opposition to immigration. Even where economic factors have significant effects, their magnitude is a good deal smaller than the effects associated with cultural concerns (Sniderman *et al.* 2004; Malhotra *et al.* 2013).

In his review of the literature on populism, Margalit (2019) concludes that voters' concerns about immigration have little to do with economic insecurity or immigration's real or perceived impact on their economic standing. Opposition to immigration represents a broader concern that natives have about declining cultural homogeneity, which in most Western countries has traditionally meant the dominance of a white, Christian population. In sum (Margalit 2019: 163):

> The research suggests that in Western countries, anti-immigration sentiments among natives center to a large degree on the social and cultural aspects. Where economic concerns do come into play, they rarely have to do with people's personal economic interests and mostly concern the way immigration affects society as a whole. Thus, while immigration is a salient concern for populist voters, economic insecurity directly related to immigration is not a key explanation for this concern.

However, given the twin cultural backlash and its cumulative effect, voters and parties of the populist radical right diverge from the mainstream on many additional issues that are not directly related to international integration, issues such as gender or cultural liberalism. Accordingly, Bornschier *et al.* (2024) conceive the conflict characterising the new

cleavage more generally as opposing universalistic and particularistic values, as well as their corresponding conceptions of community – a multicultural, open community, a vision, constructed prospectively, derived from the present and projected onto the future, versus a nationally homogenous community, constructed retrospectively, a vision derived from the past and projected onto the present (Taggart 2002). Their adoption of these labels reflects the gradual broadening of the issues and struggles associated with the new cleavage: Originally conceived as an antagonism between materialism and post-materialism or 'new' and 'old' political issues and styles, or between authoritarian and libertarian values (Kitschelt 1994), the conflict has subsequently been enlarged to include the opposition between a (national) demarcation or (international) integration position (Kriesi *et al.* 2006), cosmopolitanism and communitarianism (De Wilde *et al.* 2019; Schäfer and Zürn 2024), or an encompassing conflict between GAL (green-alternative-libertarian) and TAN (traditional-authoritarian-nationalist) positions (Hooghe *et al.* 2002).

Bornschier *et al.* (2024) insist on the importance of identities for providing the 'glue' of cleavage formation in the twenty-first-century knowledge economy environment. The politicisation of social-structural conflicts requires the formation of clear group identities – ingroup and outgroup identities. They argue that the real transformations of the economy lead individuals to re-imagine themselves as members of social groups that provide order, reassurance, and status. Collective identities furnish the link between objectively defined winners and losers of the knowledge economy to the political expression of the corresponding grievances, and identity divides develop a powerful ideological-political map through which individuals interpret the world, a map that solidifies through mobilisation and representation (Bornschier *et al.* 2024: 30).

The most striking finding of Bornschier *et al.* (2024: 43) is that the politicisation of group antagonisms of the new cleavage is very similar across contexts. This general trend speaks in favour of a long-term structural development that is characteristic of our times. Another striking finding is that economically connoted identity groups divide the self-perceptions of voters much less than culturally connoted identity groups (Bornschier *et al.* 2024: 48). Thus, the divisive potential of 'cosmopolitans' is much stronger than that of educational groups or social classes. Moreover, individuals at the extreme of the cleavage recognise the other side as the antagonist (p. 39). In terms of their group identities, the voters of the New Left and New Right party families constitute the mirror images of each other: the in-group of one electorate constitutes the out-group of the other. The in-groups of the New Left – 'feminists', 'people with migration background', and 'cosmopolitans' – constitute the core out-groups of the New Right. As an illustration of these general points, Steiner, Mader, and Schoen (2024)

show that self-identified winners and losers of globalisation in Germany are strongly rooted in the social structure and express their identities in different vote choices: self-identified losers are much more likely to choose the AfD. In contrast, self-identified winners are much more likely to choose the Union. This testifies to the claim that the universalism–particularism divide has become a full-blown cleavage that is rooted in structural potentials transcending specific country contexts.

Putting into evidence the important role of cultural identities begs the question of where these identities come from. In this respect, we can distinguish between two basic models of attitude formation – settled disposition models, which claim that the early childhood effects of socialisation persist throughout the life course, and active updating models, which allow for persistent changes in the life course (Kiley and Vaisey 2020). Based on the US General Social Survey (GSS) panels 2006–2014, Kiley and Vasey show that persistent change in attitudes is rather rare. When it occurs, it is limited in size, confirming earlier results by Hill and Kriesi (2001) and Prior (2010). There are a few items, however, where updating is important. The most conspicuous case in their analysis concerns gay rights, which they explain by the huge public salience of this issue throughout the study period that made it more amenable to attitude change. This pattern is consistent with Zaller's (1992) argument that elite opinion shifts in highly salient issues can lead to large changes in public opinion. More recently, using household panel data from several countries, Lersch (2023) finds support for his life course adaptation model, which is a version of the persistent change model. However, a major takeaway from his analysis is that we should not consider stable predispositions and persistent change as mutually exclusive.

As far as *ideological identity* (as a liberal or a conservative) is concerned, Kiley and Vaisey (2020) find that, in all practical terms, it is stable for individuals over 30. *Partisan identity*, in contrast, shows the highest degree of active updating of all political attitudes, and this updating is active across all age ranges. This finding suggests that individuals bring their partisan identification in line with their ideological identification rather than the other way around – a conclusion that is contrary to what has been stipulated by the tradition of the American voter (e.g., Lenz 2012; Achen and Bartels, 2016; Bartels and Jackman 2014). Additional, more focused studies partially confirm these overall results. Thus, parental class of origin continues to influence the vote for social democrats (Ares and van Ditmars 2024); the effect of educational fields on political attitudes (Hooghe *et al.* 2024) is significant albeit weak; and life course events such as labour market entry, unemployment, and parenthood (Kratz 2021) as well as all kinds of dissatisfaction (Kratz 2024) influence concerns about immigration among individuals with low educational attainment.

Politicisation of the new cleavage

As we have seen, the structuralist approaches run into several problems. While they are necessary to explain the general rise of the latent potentials linked to the new cleavage, they are unable to account for their variable mobilisation across time and countries and for why some mainstream parties are better able to weather the storm than others. To complete the account of the rise of the new challengers and the accompanying realignment of Western party politics, we need to turn to the supply side. The extent to which the mobilisation of the latent structural potentials succeeds largely depends on the *supply-side conditions or the political opportunity structure* in each polity.

The general opportunity structure of populist challengers

Kitschelt and McGann (1995) and Kitschelt (2007) had already conjectured that new populist challengers benefit from the *convergence of the mainstream parties* on the traditional economic dimension of party competition. Van der Brug, Fennema, and Tillie (2005) confirmed, for Western Europe during the period 1989 to 1999, that radical right parties, indeed, tended to be stronger the more their main right-wing competitor assumed a centrist political stance on the classic left–right dimension. More recently, based on a more encompassing dataset, Ward *et al.* (2015) demonstrated that globalisation and EU integration led mainstream parties to converge on economic issues (see also Nanou and Dorussen 2013). The increasing judicialization of politics – the tendency for crucial decisions to be made by European courts and constitutional courts rather than national governments – has also constrained the manoeuvring space of national governments (Scicluna and Auer 2019; Manow 2024). These global constraints make it difficult for parties to distinguish themselves from their rivals and compete effectively on the economic policy dimension, and they lead voters to question the credibility of government control over macroeconomic policies (Hellwig 2008, 2014; Hellwig and Samuels 2007).

A case in point for economic convergence is the austerity programs that center-right as well as center-left governments have adopted during the Great Recession (or the Eurozone crisis). Austerity policies crucially contribute to public discontent and populism because they undermine the protection of vulnerable workers from the enhanced social risks in open economies. Thus, Baccini and Sattler (2025) show that support for populism is higher with austerity than without, but only for radical-right and not for radical-left parties at the district level. Moreover, the effect of austerity on populism increases strongly in regions with large shares of

vulnerable workers. At the individual level, the effect of vulnerability (low education level) on populism is much higher under austerity than otherwise.

Pappas (2019: 126) suggests, more generally, that political crises of democratic representation seem to be a far better predictor of populism than economic crises. In line with this argument, Peter Mair (Mair 2000, 2002, 2011, 2013) observed what he called a *decline of the parties' representation function*, which he attributed, among other things, to the increasing importance of supra- and international governance structures and the increasing mediatisation of politics. Mainstream politicians attempt to be 'responsible', which undermines their responsiveness to voters. In his view, the lack of representation leads to the alienation of the voters from the traditional political process. The voters get the impression that the established parties are all alike, that they all betray the public behind the scenes, and that they all deserve to be sanctioned by a popular vote in the upcoming elections. In other words, the decline of the parties' representation function invites populist reactions. Mair (2011: 14) thought that 'it is possible to speak of a growing divide in the European party system between parties which claim to represent, but don't deliver, and those which deliver, but are no longer seen to represent'. In a nutshell, Mair identified a division of labour between the 'partyless democracy' of the mainstream parties and the 'protest populism' mobilised by permanent challenger parties at the margin of the party system.

Grzymala-Busse (2019) essentially reiterates Mair's point that the mainstream parties no longer represent the popular demands. She squarely dismisses structural demand-side explanations, which she considers 'neither individually necessary nor jointly sufficient causes'. What is missing from such accounts, according to Grzymala-Busse, is how political elites across the ideological spectrum have failed the voters. In line with Mair, she explains the rise of populism essentially with the failure of mainstream parties to respond to the demands of the voters. As these parties proved unable or unwilling to address their electoral challenges, new populist parties arose that seized the opportunity. Thus, the center-left's Third Way, which ceded ground to neoliberal solutions and turned away from representing workers' interests and defending the welfare state, muddled the difference between left and right and paid little attention to those left behind. As it abandoned the economic support of the working class, the center-left provoked populism. Center-right parties, in turn, only strengthened the populist radical right when trying to appease it, i.e., when they adopted similar positions or formed coalitions with it. These arguments, however, tend to be too sweeping and cannot account for cross-country variation in the relative success of mainstream parties and their mainstream challengers. Thus, the Third Way center-left won elections in the

UK under Tony Blair (1997–2007), in Germany under Gerhard Schroeder (1998–2005) and in the US under Bill Clinton (1993–2001) after a period of electoral failure of the left; and there are cases where the center-right mainstream parties succeeded in outcompeting the radical right: in the UK the Conservatives outcompeted UKIP (with Brexit as the price to pay) and the British Reform Party (2016–2024), in Austria the ÖVP did the same with the FPÖ (2017–2024), and in Greece the radical right never got a chance against ND.

Schäfer and Zürn (2024) also attribute great importance to the failure of the mainstream parties to represent the left behind. However, in contrast to the previous authors, they explicitly link this failure to the new cleavage. They attempt to integrate economic and cultural distortions into their political explanation to yield a complex account. They argue that economic and cultural explanations of populism must be supplemented by a political one (p. 71), i.e., by an explanation that refers to the dissatisfaction with the political system as a whole and the lack of trust in decision makers. The political explanation refers to the widespread feeling that one is inadequately represented in democracy, and to the alienation from democracy that comes with it. Schäfer and Zürn point out two developments to account for the growing dissatisfaction with established democracies: inadequate responsiveness of parliaments that pay special attention to the upper social layers and classes and neglect the demands of lower classes, and the declining importance of parliaments and parties which lose power to non-majoritarian institutions such as central banks, courts, experts, and international organisations that are all decidedly more cosmopolitan than the parliaments. More generally, they argue that globalisation has dissolved the connection between the nation-state and democracy.[3] Effective problem-solving that can be democratically legitimised depends on the social and political space being congruent (p. 149), which is less and less the case. As long as the impact of national decisions is constrained and affected by decisions taken elsewhere, democratic mechanisms within the nation-state and democratic principles are no longer identical (p. 151): citizens are ruled by decisions that they cannot influence, i.e., they cannot govern themselves, which leads to their political discontent and alienation.

The series of recent crises reinforced the alienation of large parts of the population from the political establishment because they reinforced executive decision-making in cooperation with non-majoritarian institutions. Even if crisis management in European democracies proved to be comparatively successful, it lacked democratic legitimation.

In line with these arguments, populist attitudes among voters have been shown to have an effect on the vote for populist parties that is independent of substantive demands (see A. Akkerman *et al.* 2014;

A. Akkerman *et al.* 2017; Lubbers *et al.* 2002; Van Hauwaert and Van Kessel 2018; Hawkins and Littvay 2019). The same applies to *political discontent* originating in specific political dynamics. Thus, citizens with low levels of political trust are more likely to vote for a populist challenger party. Moreover, having voted for such a party subsequently leads to a further decrease in political trust, as Hooghe and Dassonneville (2018) show for Belgian voters. However, the effect of political discontent on the vote for challenger parties varies depending on the political conditions under which they operate. To the extent that the challenger parties become mainstreamed, i.e., an established part of the national party system, their voters become much more satisfied with the way democracy works. Thus, the effect of political discontent on the vote is greatly reduced for both radical left and radical right parties that join the government (Kriesi and Schulte-Cloos 2020).

Country-specific variations of the opportunity structure

Political choices are embedded in cross-national *institutional differences*, of which the democratic regime (parliamentary, semi-presidential, or presidential) and the electoral system (majoritarian or proportional) are the most important ones. Their combined effect on the impact of populist challengers is ambivalent, however. On the one hand, presidential and majoritarian parliamentary systems concentrate power and render life for new challengers rather difficult, whereas proportional parliamentary systems fragment power and facilitate the rise of new challengers. On the other hand, once they get into power in presidential and majoritarian systems, new challengers get power undivided, whereas they must always share power with coalition partners in proportional systems. Importantly, in Western Europe, which is the focus of this review, proportional and parliamentary systems prevail.

Second, regarding the configuration and strategies of competitors, *incumbency* is a crucial factor. Opportunity for challengers opens in crises that overwhelm whoever happens to be the incumbent. Thus, Achen and Bartels (2016) conclude from the rise of Roosevelt and Hitler in the Great Depression that for populists to rise, they need an economic crisis, myopic (i.e., short-term) retrospection on the part of the voters, and a message that plays to the identity and self-understanding of a substantial group of the population. They claim that, in the Great Depression, voters responded to the hardships of the economic collapse in much the same way they responded to ordinary economic cycles: they voted out the incumbents and opted for the opposition. Across the world, incumbents were deposed with impressive consistency, regardless of ideology. Moreover, Achen and Bartels claim that there is strong and consistent evidence that

Roosevelt's landslide re-election hinged importantly on the fact that he presided over strong income growth during the election year. This account is, however, too simplistic. The key difference between the US and Germany in the Great Depression is that in the US, it was the mainstream opposition party that replaced the incumbents, whereas in Germany, the radical-right challenger came into power. It is not possible to go into the details accounting for this difference here; suffice it to say that in the Weimar Republic, the combination of a semi-presidential system with a proportional system led to a series of dissolutions of the Parliament and anticipated elections (initiated by the President and the Camarilla around him, see Shugart and Carey 1992: 70) and to an accompanying increase in the fragmentation of the party system, i.e., to the rapid rise of populist challenger parties on the left (communists) and the right (the Nazis). At a given point in time (1932), these two parties jointly had a majority in Parliament, and no coalition of moderate parties was any longer able to govern. Attempts with minority governments failed, and the eventual cooptation of the Nazis into a government with the moderate right proved to be fatal for democracy.

In general, the vicissitudes of incumbency may be more complex than suggested by Achen and Bartels. As we know from Roberts' (2014) analysis of the consequences of the implementation of structural adjustment programs in the Latin American economic crisis of the 1980s/1990s, the outcomes were shaped by contingent alignments or configurations of actors during the economic crisis. The transformation of a party system by reactive sequences unleashed by a political crisis takes time and is likely to occur in a stepwise fashion (Roberts 2017: 5). The demise of the old order may result in fluid, unstable party competition so that no new equilibrium is reached. Most likely, it takes a series of 'critical elections' for a deep crisis to transform the party system of a given country. At first, the voters who punish the mainstream incumbent tend to turn to the mainstream opposition. Only in subsequent steps, when the mainstream opposition also proves incapable of improving the situation, are voters likely to opt for populist challenger parties (Hernández and Kriesi 2016). Moreover, mainstream parties may recover, and populist challengers may decline again, as is currently the case for the populist radical left that rose during the Great Recession across Southern Europe and tends to disappear in the not-too-long run.

The mobilisation by the new challengers

Importantly, endogenous political dynamics may not only create political discontent but also shape the economic and cultural grievances and identities of the population. If parties do not change political attitudes, they

may influence their relative salience (Dennison and Kriesi 2023). As Przeworski 1985: 100–101) claimed with respect to class already some time ago:

> …, the relative salience of class as a determinant of voting behavior is a cumulative consequence of strategies pursued by political parties of the Left …. political parties – along with unions, churches, factories, and schools – forge collective identities, instill commitments, define the interests on behalf of which collective actions become possible, offer choices to individuals, and deny them.

Oesch and Rennwald (2018: 18) argue that in terms of economic attitudes, production and service workers are close to the left, whereas they are close to the radical right in terms of their cultural attitudes. Accordingly, depending on which type of attitude is salient, workers will either opt for the left or the radical right. A study by Thau (2021), based on British data covering 14 elections during the period 1964–2015, documents how group-based voting differences depend on how parties appeal to different groups of voters. Voters know their group identifications, but they need a clear conceptual link between the group category with which they identify and a given party for group-based voting to occur. Thau finds that the working-class vote becomes more different from the vote of other classes the more Labour emphasises its working-class ties. In line with previously reported results of Bornschier *et al.* (2024), Thau can also show that group-based appeals are more consequential than economic policy appeals. Similarly, in their study of the impact of a Swiss border liberalisation measure on the success of the radical right, Alrababah *et al.* (2025) find no adverse effects of free movement on citizens' employment or wages, nor on their subjective perceptions of economic, cultural, or security threats. Instead, they document the effect of novel narratives related to overcrowding introduced by the radical right to advance hostility towards immigrants. They provide evidence that this rhetoric targeted border municipalities, where it had the greatest impact on voters susceptible to political persuasion. Their findings suggest that elite rhetoric can play a decisive role in driving anti-immigrant votes.

As far as the mobilisation by populist challengers, in particular, is concerned, Dollbaum and Dollbaum (2023) consider the conditions under which such parties are successful. They explain the success of challenger parties with the importance of the party's leader and his or her mass contact. Based on an original dataset covering 74 challenger parties from the five countries most hit by the Great Recession (all non-regional challengers which obtained at least .5% in any of the elections between 2005 and 2020), they show that challenger parties can win over voters by harnessing the prominence of a well-known personality (a 'locomotive') and

by establishing a means of contacting voters (a 'megaphone') which bypasses the traditional news media and amplifies their message (e.g., *via* regular participation in major TV talk shows like Pablo Iglesias, or *via* live comedy shows, widely read blogs or street activism like Beppe Grillo). However, this megaphone only works if it amplifies a message that fills a representational gap (in their case, an anti-austerity message). Contrary to received wisdom, a populist message on its own has no effect and provides (limited) support only when coupled with mass contact.

Betz (2025) describes the role of nativism for the mobilisation by the radical right, and explains the latter's great appeal to those who long for social justice, with its appeal to emotions. Central to nativism is that '*our people*' should come first. It appeals to people who have the impression that the strangers get everything, while the indigenous population is left behind. It is the 'deep story' of resentment described by Hochschild (2016) based on her experience with ordinary people in Louisiana: while patiently waiting in line, they see other people cutting in line. And as others cut in, they seem to be moved back. On top of it, they are told that they need to feel sorry for the line-cutters, since these line-cutters are victims of discrimination, racism, sexism, and other kinds of oppression. And while those patiently waiting in line might have suffered a good deal themselves, their suffering, their struggles do not count.

Central to nativism are also appeals to *nostalgia*, which stands for a sentimental yearning for an idealised, lost past, reflecting the refusal to confront the reality of an unpleasant present. Smeekes, Wildschut, and Sedikides (2021) suggest that national nostalgia has become a new master-frame of populist radical-right wing parties, which explains, to a certain extent, why voters support them at the polls: 'These parties implement national nostalgia to define, essentialize, and unite 'the pure people' of a native background against 'dangerous others'—specifically, Muslims' (p. 97f.). They glorify a mythical and idealised version of the national past, in which the country consisted of a virtuous and morally upright national community that was culturally and ethnically homogeneous, which they want to preserve by excluding newcomers who threaten this ideal. As Betz (2025) points out, nostalgia is a particularly potent driving force of populist mobilisation if it is joined to a narrative of collective victimisation and humiliation. He gives Victor Orbán as a prime example. Orbán has been particularly skilled in manipulating diffuse sentiments of national humiliation and resentment, conjuring up the spectre of the Treaty of Trianon, which deprived Hungary of large parts of its territory after World War I, but also evoking nostalgia for the nation's golden age when Hungary was on equal footing with the Austrians in the 'Dual Monarchy'. Other prominent cases are India's Narendra Modi and Turkey's Recep Tayyip Erdogan, both driven by a profound sense of resentment,

which fuels a nostalgia-inspired project designed to make the nation great again.

Stressing the role of emotions for the radical right's nativist appeal is, however, not the same as claiming that populism is an integral part of the radical right's discourse, i.e., part of its thick ideology. All kinds of parties appeal to emotions; they are just not equally successful in doing so. Similarly, making elites responsible for one's ills is not necessarily an integral part of the radical right's thick ideology.[4] To be sure, the reference to simple causal chains, invoking human agency (evil actors) instead of structural processes, and the proposal of simple, quick solutions characterise the populist radical right's political strategy. But such rhetorical appeals are also characteristic of the populist radical left. Moreover, such appeals are above all characteristic of these parties during their original rise to electoral success. In the long run, however, such appeals are likely to lose their traction, whether the parties are from the radical left or the radical right, as a result of their organisational development.

The impact of the populist challengers on the party system

From the point of view of the structuration of the party system, populism as such has a de-structuring effect. Populist leaders not only benefit from the de-structuring of party competition in political crises, but they also contribute to it by creating parties focused on their personal charisma. Populist leaders are typically outsiders who use a personalistic strategy, establishing a direct, plebiscitarian, unmediated relationship with the people (Weyland 2024). Thus, Latin American right-wing populists typically refuse to build true parties and 'rely instead on fluid movements and flimsy electoral vehicles' (Weyland 2024: 126; Roberts 2006). Berlusconi, the ultimate Italian populist, came to power in a moment when the Italian party system fell apart, without a proper party but as the head of a largely unstructured movement. Similarly, Geert Wilders rose in the Netherlands as the leader of a one-member party. More generally, populist parties gravitate towards personalised leaders and are internally less democratic than established parties (Böhmelt *et al.* 2022). Populist leaders either create their own parties or keep their parties under full control, eliminating all internal opposition, and leading them in a highly centralised fashion (Pappas 2019: 104). If they get undivided government power, they try to retain it by executive aggrandisement and strategic election manipulation (Bermeo 2016). Under very specific conditions, theorised by Weyland (2024), only a few (Fujimori, Bukele, Chavez, Correa, Morales, Orbán, and Erdogan) have succeeded in their power grab, establishing illiberal or authoritarian regimes. Most, however, tend either to self-destruct or their parties become rather more conventional organisations. Destruction

beckons if the personalistic leaders come to power and prove to be unable to provide the miraculous masterstrokes they had promised. Weyland (2024) provides a considerable number of examples of such failures from Latin America or Eastern Europe.

In Western Europe, on which I focus in this review, getting undivided power is, however, unlikely, for institutional reasons mentioned earlier. Successful populist parties typically have to share power with coalition partners. For this reason alone, the risk of self-destruction is more limited. More importantly, however, as argued by Kitschelt (2000), following Weber (1985: 142–148), 'charisma is a quality of personal authority that is difficult to sustain in a movement or party. Sooner or later, charismatic leaders or their successors will be forced to routinise authority relations and put them on a different grounding'. And this grounding is most likely to be of the programmatic type, which contributes to the restructuring of the party systems. This applies above all to the populist parties of the radical right that contribute to the stable restructuring of West European party systems in particular by constituting the nationalist pole in the emerging tripolar structure (Kriesi *et al.* 2012; Oesch and Rennwald 2018; Bornschier *et al.* 2024). As they become an integral part of the restructured party systems, the radical populist challengers tend to soften their populism and become mainstream parties. Their inclusion in regular democratic processes (Berman 2008; Akkerman 2016), electoral dynamics (Wagner 2012; Krause 2020), and participation in government (Heinze 2018; Paxton 2023; Axelsen 2024), tends to moderate radical challenger parties. The other two poles in the tripolar structure are constituted by the mainstream parties that find support among the new middle-class winners of the new cleavage. One part of the new middle class – the social-cultural professionals – votes for the left block (including the Greens), while another part – the managers and technicians – votes for the block of the center-right. The large but often neglected pool of voters who benefit from technological innovation seems willing to support mainstream parties and uphold the existing social contract (see Steiner *et al.* (2024) for the vote of self-identified winners, and Gallego *et al.* (2022) for British beneficiaries of digitalization). However, under the impact of the electoral threat exerted by the challengers from the New Left and the New Right, the mainstream parties constituting these other two poles have been shifting their focus in electoral competition as well. If they had originally avoided the new cultural issues because of programmatic constraints, incumbency, or to prevent internal divisions (De Vries and van de Wardt 2011; Green-Pedersen 2012; Hooghe and Marks 2018; Netjes and Binnema 2007; Sitter 2001; Steenbergen and Scott 2004), they have started to respond to the electoral success of the new challengers with a strategy of shifting competition to new cultural issue domains (Ward

et al. 2015). On the one hand, the electoral success of the Greens prompted the social democrats to shift in the direction of the cosmopolitan or universalistic camp of the new cleavage. In the process, they became middle-class parties in almost all the countries of Western Europe (see, e.g., Gingrich and Häusermann 2015; Häusermann & Kriesi 2015; Kitschelt 1994; Häusermann and Kitschelt 2024). On the other hand, the success of the radical right parties prompted some mainstream parties of the centre-right to shift their programmatic position towards a more restrictive stance on immigration (Abou-Chadi and Krause 2020; Abou-Chadi *et al.* 2022). As already mentioned, some mainstream parties, such as the British Conservatives, the Hungarian Fidesz, or the Greek Nea Demokratia, even succeeded in out-competing the radical right on their own terrain (UKIP, Jobbik, and LAOS) (see Kriesi *et al.* 2024: Chapter 14). Moreover, in some countries, the populist challengers mobilised within mainstream parties. They transformed them into populist parties, as occurred with the American Republicans, who entirely changed their profile under the impact of Donald Trump to become a populist radical right party in their own right (Hawkins and Littvay 2019).

Conclusion

In this review of the literature on cleavage formation and populism, I have argued that the contemporary rise of populism is the result of societal transformations, which lead to the creation of latent structural potentials that political parties, populist or not, can mobilise. The key societal transformations put into evidence are linked to the rise of the knowledge-based economy and globalisation, which reinforces the decline of the working class and, at the same time, enhances the rise of a new middle class of the highly educated. The subjective perceptions of these structural developments lead to feelings of status loss, relative deprivation and concomitant intolerance, resentment, political discontent, and a nativist or particularistic ideology on the part of the working-class losers of the transformation, and feelings of satisfaction, tolerance, openness, and a cosmopolitan or universalistic ideology on the part of the middle-class winners. A new structural cleavage is taking shape that opposes the working-class losers and the new middle-class winners.

This new cleavage has been mainly articulated politically around cultural issues that have been mobilised by the New Left (the Greens) and the New Right (the populist radical right). Populism as a thin ideology has played an asymmetrical role in the mobilisation attempts of challenger parties. It has mainly been embraced by the old radical left and the new radical right challengers, mobilising the working-class losers of the transformation process. The mobilisation of the winners hardly relied on the thin ideology of populism at all.

In the past, populism was a temporary phenomenon: it faded out with the improvement of the economy. For different reasons, it is likely to be a temporary phenomenon once again. Given its association with the emergence of the new cleavage, it is likely to fade away as the new challenger parties become an integral part of the reconfigured party systems. With the expected mainstreaming of the new challenger parties, these parties are likely to abandon their populist appeals and become part of the new consolidated mainstream. The tripolar structure that is emerging in European party systems is likely to be the new normal. The left, organising the social-cultural new middle class and the progressive working class, opposes a divided right. One part of the right organises the liberal administrative and technical new middle class, while another part defends the conservative working class and the old middle class – Kitschelt and McGann's (1995) 'winning formula' of the populist radical right. This is the optimistic scenario.

There is a more pessimistic scenario as well: populists in power may not abandon their populism but may do much harm before they are eventually voted or forced out of office. As is pointed out by Rosanvallon (2021: 145–149), populists in power have the tendency to view their electoral victory as irreversible. As soon as they are in power, the notion of majority changes. It is no longer simply the expression of circumstantial arithmetic data, but the triumph of 'the people' over its enemies. Irreversibility is then instituted by populist regimes by taking recourse to constituent assemblies or by changing conditions for key elections. Such an outcome is more likely if populists get power undivided, which is why electoral rules that force populists or any other party to form coalition governments are so important. In the extreme, a well-established democracy may be destroyed under populist rule: As Alexander Gerschenkron (Gerschenkron 1989: 4–5), in his book on Germany, originally published in 1943, wrote:

> The causes may be temporary, but the effects are not. Rejection of democracy may be the result of a temporary combination of special circumstances that produce an antidemocratic psychosis among the populace. The popular mood may pass rapidly, along with the conditions that have occasioned it. However, the profound political change which it has caused remains and remains permanently unless, indeed, it is reversed by the immense effort of global war.

Notes

1. Inglehart and Norris (2017) also invoke economic growth, even if they privilege cultural explanations: they find strong periodization in the development of post-materialism over time: cohorts became more materialist in response to major recessions, but with subsequent economic recovery, the proportion of post-materialists recovered.

2. This has not always been the case. In fact, the Industrial Revolution replaced artisanal work with routinized labor. In the current technological revolution, innovation has changed course to favor skill and promote inequality.
3. The intimate link between the nation-state and democracy resides in the fact that the two principles which form the core of the modern idea of the nation – the principle of popular sovereignty that is expressed in a state, and the principle of fundamental equality of all the members of the community – are at the same time the basic principles of democracy: democracy was born with a sense of nationality, democracy was contained in the idea of the nation like the butterfly in its nymph (Greenfeld 1992: 10). Originally, nationalism developed in the name of democracy. Only later, to the extent that the idea of the nation became tied to its uniqueness and no longer to its sovereignty, the original connection between the two got lost.
4. This has been suggested by two reviewers of this paper.

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